



## 21<sup>st</sup> Century Life Planning Advocacy

### **Advocacy Leadership for Positive Aging (ALPA): Life Planning in the 21<sup>st</sup> Century A Professional Development Certificate Program**

D R A F T, October 2, 2011, from Jan Hively

#### **Background**

In just one decade, 21<sup>st</sup> century trends and research and technologies have dramatically changed expectations for midlife and beyond. The Positive Aging movement stems from new understandings about our capacity for growth and renewal “through the last breath.” New technologies are expanding opportunities for active, productive aging lifelong. At the same time, however, economic and financial shifts have created an intimidating future for millions of older adults. Too many are unprepared for the current and future changes and unable to plan or seek resources to help themselves, each other, and their communities.

As committed advocates for Positive Aging, the program convenors are reaching out across academic disciplines to engage all of those who work with older adults in a “train the trainer” process. Traditional providers and community elders, as well as practitioners in the emerging life planning specialties, should be prepared with the understandings and tools to act as advocacy leaders for positive aging.

#### **Program Plan**

**ALPA Network.** The goal is to develop an ALPA network through which graduates can connect informally with each other and with a resource website on an ongoing basis to assist their work with older adults. They might meet face-to-face annually at the Positive Aging Conference.

**Hosts and Sponsors.** The pilot program would be offered as an online curriculum by a university with an applied gerontology program such as Fielding Graduate University. Based on evaluation results, the program might be offered by multiple hosts in the future such as professional networks in collaboration with one or more community colleges or universities. Professional networks would be asked to help sponsor the program, recruit participants, and offer CEUs to members of their professional associations.

**Participation.** A cohort of approximately 20 to 30 participants will be admitted for each sequence of the non-credit, professional education program. Admission requirements would include a bachelor’s degree and past or present experience working with older adults (paid or unpaid work). Those who complete the course will earn a certificate plus ongoing membership

in the ALPA Network. Participants will be expected to: a) attend each class; b) participate in team assignments and class discussions; c) write reports on interviews; d) develop and report on an individualized fieldwork project; and e) provide program evaluation feedback.

**Format.** Presentations will usually be offered via webinars. In some cases, videos will be used to show examples of programs, for example, the creative arts programs. Ideally, the website manager will show the photo of the person speaking during the discussion period. If there is a group of participants residing in the same region, an effort will be made to bring them together for the class sessions.

**Costs.** Fees would be set to cover the costs (Curriculum Development, Course Management, Marketing, Research/Evaluation, and Follow-up). A Faculty/Course Leader and Program Coordinator are both critical to program implementation. A Project Coach would receive a stipend to guide each participant through a Fieldwork Project. Sponsors will be asked to provide scholarships for participants, based on need.

**Website.** A participant-only website will be prepared prior to the first session with the syllabus, information about the topic and the course, photos and brief bios for participants, bibliography, specific links to videos and reading material for each session, assignments, and a chat room. Questions will be posted in the chat room at the beginning of the course to stimulate discussion. There will be no formal requirements for use of the chat room. Meeting summaries will be added. Participant project descriptions and papers will be posted. The website will be used for evaluation surveys based on recommendations from the Research and Evaluation Advisory Group.

**Learning Objectives.** The participants will:

1. Understand the core concepts and values: “positive aging,” “life planning,” “advocacy”;
2. Understand recent major changes affecting expectations for aging;
3. Consider the impacts of these changes that create both opportunities and challenges for life planning and positive aging;
4. Help identify elements and examples of advocacy leadership that builds on assets and facilitates positive aging;
5. Learn about tools and other approaches that empower positive aging and life planning, specifically those which help older adults and their communities build upon and expand positive aging and life planning resources;
6. Apply this learning in the context of an individualized fieldwork project; and
7. Reflect on what is needed for effective advocacy and consider some next steps, including networking with others, to address the needs.

### **Program Outline**

The schedule assumes the availability of 2 ½ to 3 hours for each session.

Prior to the first session, registered participants will be asked to interview an older adult (prescribed process posted on the website) and submit 300 words or less describing:

- Changes experienced in the life of the adult over the last decade;
- Changes in the community affecting older adults over the last decade

The material will be organized, summarized, and posted on the website to stimulate dialogue at the first session. The participants will also post photos and brief bios of themselves with contact information on the website.

### Session 1: Getting Started/ Life Planning

- Review of the learning objectives, syllabus, assignments, and use of the website
- Go-round of introductions, each one offering one or two highlights from the preliminary assignment and a personal reason for taking the course
- Defining through discussion the core concepts: What's "positive aging", "life planning", "advocacy"?
- "Life Planning": Presentation -- Mary Radu. "What are the elements of life planning?" "What is essential to the process of life planning?"

### Session 2: Positive Aging

- What does research tell us about the individual and community assets/competencies relevant to promote and support positive aging?
  - Presentation by Ellen Langer, "The Power of Possibility?" (or Martin Seligman, "Positivity")
  - Review of internal assets/competencies and external assets fundamental to positive aging
  - Tools to assess older adult assets and professional competencies for life planning and positive aging (multiple presenters)
    - ..LPN's LPCI professional competency inventory (Sharon Sokoloff or Kit Hayes)
    - ..Vital Aging and Vital Communities questionnaires looking at the assets of older adults and the community infrastructure (Jan Hively)
    - ..VIP (Vital Involvement Practice) -- assessment of strengths and needs of older adults being served (Helen Kivnick)
    - ..Positivity assessment (Karma Kitaj)
    - ..Other assessments for service providers and/or adults being served??
- Participant assignment to try out one or more of the asset assessments and evaluate results

### Session 3. What's New? Expanding the Potential for Positive Aging (1)

- Brain research – cell renewal, new stages of development learning along with developmental changes in the brain. Presentation – Gene Cohen (video)
- Creativity research - Creative expression a powerful factor for healthy aging. Presentation – Susan Perlstein
  - Relevant programs introduced by Judith – Kate Friedman – sample of creative arts and aging programs (music, dance, writing, theatre, storytelling). MnCAAN film
- Lifelong Learning programs to "turn the light on"  
Presentation – Connie Corley
  - Relevant programs – Mind Alert, OLLI, Encore programs

### Session 4: What's New? Expanding the Potential for Positive Aging (2)

- Wellness research – Exercise, nutrition, relationships. Dimensions of wellness. Presentation – Peter Whitehouse
  - Relevant programs – Exercise, nutrition, intimacy, spirituality, communication, intergenerational relationships, planning for economic security
- Holistic Medicine – Presentation: Elizabeth Craig
- Discussion about participant results from assessments and reading assignments

### Session 5: The Flip Side – Risk Factors, Deficits, Decline

- Research on Risk Factors

Presentation -- Terry Hokenstad

Relevant programs, supplementary presentations, Case studies

Discussion about what changes participants have noted during the last decade in relation to risk factors.

- Assignment: Interview a non-affluent older adult about his/her situation in relation to both the positive aging assets/competencies and the risk factors described by Hokenstad. Use assigned survey questions plus probes, and submit a report using assigned format.

#### Session 6: Expanding the Gap and Financial Woes

- Research re: the financial woes of older adults, the factors that caused the situation, their relevance to the risk factors, and their impact on older adults.  
Presentation: BC Center on Retirement Research, Alicia Munnell
- Resources to find meaningful work, with income  
Plan B for Boomers – Carleen Mackay  
SHiFT, Midternship – Kate Schaefer  
Collaborative Entrepreneurship – Make > Shift, Resilience Circles, Community-based Economies – Jan Hively  
Workforce 50 – Gene Burnard  
Discovering What's Next – Doug Dickson
- Resources for Financial Planning  
American Institute of Financial Gerontology – Neal Carter  
Financial Security Project – Center for Retirement Research – Alicia Munnell  
NCOA's "Enhancing Economic Security" programs – Sandra Nathan  
AARP FIT program
- Discussion about assignment for participants to submit proposals for field projects by the end of the 7<sup>th</sup> session. Staff will talk with each participant and will approve proposals, revised as needed, by the end of the 8<sup>th</sup> session.

#### Session 7: Resources for Positive Aging

- New Technologies to support Positive Aging  
Presentation -- ???  
Examples – Skype, telemedicine, home-based employment, disability access
- Strengthening Community Assets to support Positive Aging  
Presentation – Nancy Henkin  
Examples – Communities for a Lifetime (MN), Coming of Age (Dick Goldberg), Elderburbia (Stafford), Age Friendly Housing (Chris Kennedy)
- Discussion about participant reports on interviews with older adults, applying information about assets and risk factors

#### Session 8: Advocacy Leadership

- What does "advocacy leadership" mean within the context of professional services and life planning?  
Discussion: "What does advocacy leadership mean for you?" Throughout the course, participants will be asked to assess their professional responsibilities in relation to advocacy leadership for positive aging.  
Presentation: "Leadership Can Be Taught" – Sharon Daloz Parks
- Presentations by participants of field project proposals. Three minutes for presentation and 2 minutes for group feedback (use web survey tool to collect feedback)  
Discussion about assignment of mentors for projects

### Sessions 9 and 10. Fieldwork Projects

Participants will be working on their field projects, with assigned mentors and staff coaching.

### Session 11: Participant Fieldwork Reports

- Depending on the number of participants, each will be given 10 to 15 minutes to give a report and receive feedback. Mentors will be asked to attend

### Session 12: Participant Fieldwork Reports, Evaluation, What's Next

- Up to ½ of the session for completing the fieldwork reports
- What worked? Discussion: What process engaged the productivity of the older adult? What is needed for effective advocacy? How has this work affected your perception of yourself as an advocacy leader?
- What next? What are some next steps that participants might take to address the identified needs? What's next for the group?
- Evaluation. Discussion feedback process eliciting participant feedback in relation to:
  - ..The promised learning outcomes
  - ..How the program has affected the participant's work with older adults?
  - ..Whether the participant has any plans to collaborate with others in the program?

*PAC Workshop participants will be asked to:*

*a) provide feedback on the proposed curriculum;*

*b) suggest examples of role models (people and tools/programs) for advocacy leadership; and*

*c) consider how the course might affect the practice of service providers and the planning of older adults.*

